HOW TO ENTER AN EXPENDITURE

When you log into the e-filing system, the first page you will see is your home page. On this page you can choose what action you would like to perform in the action menu. You can also see a schedule of upcoming reports.

Q: What are the "Lock Expenditure Info" and "Lock Payee Info" used for?

A: These are time-saving features if you have multiple expenditures to the same payee (use "Lock Payee Info") or multiple expenditures with the same date and amount (use "Lock Expenditure Info"). "Locking" payee or expenditure info means that you don't have to re-enter the "locked" info each time.
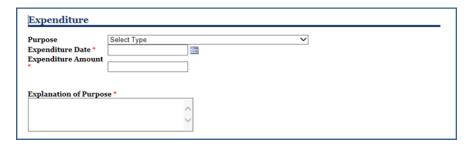
Step 1: Click on the **ENTER AN EXPENDITURE** button in the action menu.

What do you want to do today?

Enter a Contribution	File a Report	Enter an Expenditure
Amend a Filed Contribution	Search Transactions	Amend a Filed Expenditure
View / Amend an Unfiled Contribution		View / Amend an Unfiled Expenditure
Enter / Amend a Loan		Enter / Amend a Debt

Step 2: Choose the payee type from the options in the drop-down box. The e-filing system will provide fields for required information for the payee based on the payee type selected.

Payee

Payee Type* [Individual Payee ▾]

Step 3: Enter the required information in the fields provided for the expenditure. All fields with a red asterisk are required. *When entering the amount, do not use a dollar sign – only enter numbers and a decimal point.*

Expenditure

Purpose [Select Type ▾]
Expenditure Date *
Expenditure Amount *

Explanation of Purpose *

Step 4: Click the **SAVE** button when you are finished entering the information. (Clicking the Cancel button will delete the information you entered and bring you to the Expenditure Administration page.)

Step 5: After you click the **SAVE** button, you will get confirmation that the expenditure was recorded. You will also get options for what you would like to do next - enter another expenditure or enter a contribution.

✅ Expenditure has been successfully recorded.

Add Another Expenditure	File Next Report	Contributions
Return		

(We recommend that you not use the File Next Report option. If you want to file a report, please use the View / File Reports tab.)